

Session 8

Electronic Requirements

Questions we will answer during this session:

What are the major electronic processes in which schools are required to participate?

How do schools send and receive data electronically?

What role does the Internet play in Title IV?

How do schools get answers to questions regarding the electronic requirements?

What are the major electronic processes in which schools are required to participate?

ED-DESIGNATED PROCESSES AND DEADLINE DATES	
Deadline Date	Designated Electronic Processes
January 1, 1998	<ul style="list-style-type: none"> ◆ Participate in the <u>Title IV Wide Area Network (TIV WAN)</u>*. ◆ For the 1998–99 processing year¹ and beyond: <ul style="list-style-type: none"> • Receipt of Institutional Student Information Records (ISIRs).² • Adding your institution to the <u>Central Processing System (CPS) Record</u>*. • On-line access to the National Student Loan Data System (NSLDS).
July 1, 1998	<ul style="list-style-type: none"> ◆ Access the "Info for Financial Aid Professionals" web site or the Student Financial Assistance Bulletin Board System (SFA BBS). ◆ Submission of the Application for Approval to Participate in Federal Student Aid Programs (recertification, reinstatement, and changes) through the Internet. ◆ Submission of the <u>Fiscal Operations Report and Application to Participate (FISAP)</u>* to the Title IV Wide Area Network (TIV WAN). Diskettes and magnetic tapes/cartridges eliminated.
July 1, 1999	<ul style="list-style-type: none"> ◆ For the 1999–2000 award year and beyond: Report Federal Pell Grant Payments electronically or on magnetic tape or cartridge to the Title IV Wide Area Network (TIV WAN). Diskettes eliminated. ◆ Submit Student Status Confirmation Report (SSCR) data electronically or on magnetic tape or cartridge to the National Student Loan Data System (NSLDS). Diskettes eliminated. ◆ Submit Federal Perkins Loan Data electronically or on magnetic tape or cartridge to the National Student Loan Data System (NSLDS). Diskettes eliminated.

¹ The application processing cycle lasts 18 months. For the 1998–99 award year, application processing begins in January 1998 and applications for that year will be accepted until June 30, 1999.

² The Secretary realizes that processing Title IV aid upon the receipt of an ISIR, rather than the paper Student Aid Report (SAR), may be new for some institutions. In order to provide these institutions sufficient time to implement electronic procedures to receive ISIRs, the Secretary will not assess any penalties against an institution that is not able to comply with this requirement on January 1, 1998. However, beginning July 1, 1998, all institutions are expected to be receiving ISIRs electronically for any Title IV applicant who has listed that institution on the applicant record in the CPS.

_____* - See Glossary

**TECHNICAL SPECIFICATIONS
FOR ED-REQUIRED ELECTRONIC PROCESSES**

Equipment	Current Minimum Configuration (Depending Upon Volume and Usage)	Minimum Configuration Required by January 1999
	<ul style="list-style-type: none"> ✦ IBM or fully IBM-compatible PC ✦ 66 <u>MHz</u>* Processor 486DX2 ✦ 16 MB <u>RAM</u>* ✦ 300 <u>MB</u>* Hard Disk Space ✦ 14,400 <u>bps</u>* or higher baud Hayes or comparable <u>Modem</u>* ✦ 3.5"/1.44 MB Diskette Drive ✦ <u>SVGA Monitor</u>* ✦ Standard Keyboard ✦ Printer capable of printing on standard paper (8 1/2" x 11") ✦ 4x <u>CD-ROM</u>* Drive with sound board¹ 	<ul style="list-style-type: none"> ✦ IBM or fully IBM-compatible PC ✦ 200 MHz Pentium Processor or compatible ✦ 64 MB RAM ✦ 4.0 <u>GB</u>* <u>SCSI</u>* Hard Drive ✦ 56K Analog Modem ✦ 3.5"/1.44 MB Diskette Drive ✦ SVGA Monitor ✦ Windows 95 Keyboard ✦ Laser printer capable of printing on standard paper (8 1/2" x 11") ✦ 12x CD-ROM Drive with sound board¹
Software	<ul style="list-style-type: none"> ✦ MS-DOS version 6.2 or higher; Windows 3.1, 3.11, or 95 ✦ Internet Service Provider (ISP)² ✦ <u>Netscape Navigator</u>* 3.0 or 3.01 (domestic), Microsoft Internet Explorer 4.0, or other <u>web browser</u>*³ 	<ul style="list-style-type: none"> ✦ 32 bit <u>operating system</u>* (<u>Windows 95</u>* or <u>Windows NT 4.x</u>*) ✦ Internet Service Provider (ISP)² ✦ Netscape Navigator 3.0 or 3.01 (domestic), Microsoft Internet Explorer 4.0, or other web browser³
Phone Line	✦ Dedicated phone line	✦ Dedicated phone line
Diskettes	✦ 3.5" high-density double-sided diskettes	✦ 3.5" high-density double-sided diskettes

¹ Required if institutions want to use the EDExpress Tutorial and the AWARE software.

² Will be necessary to access the "Information for Financial Aid Professionals" web site or the Student Financial Assistance Bulletin Board System (SFA BBS) and for submission of the Application for Approval to Participate in Federal Student Aid Programs (recertification, reinstatement, and changes).

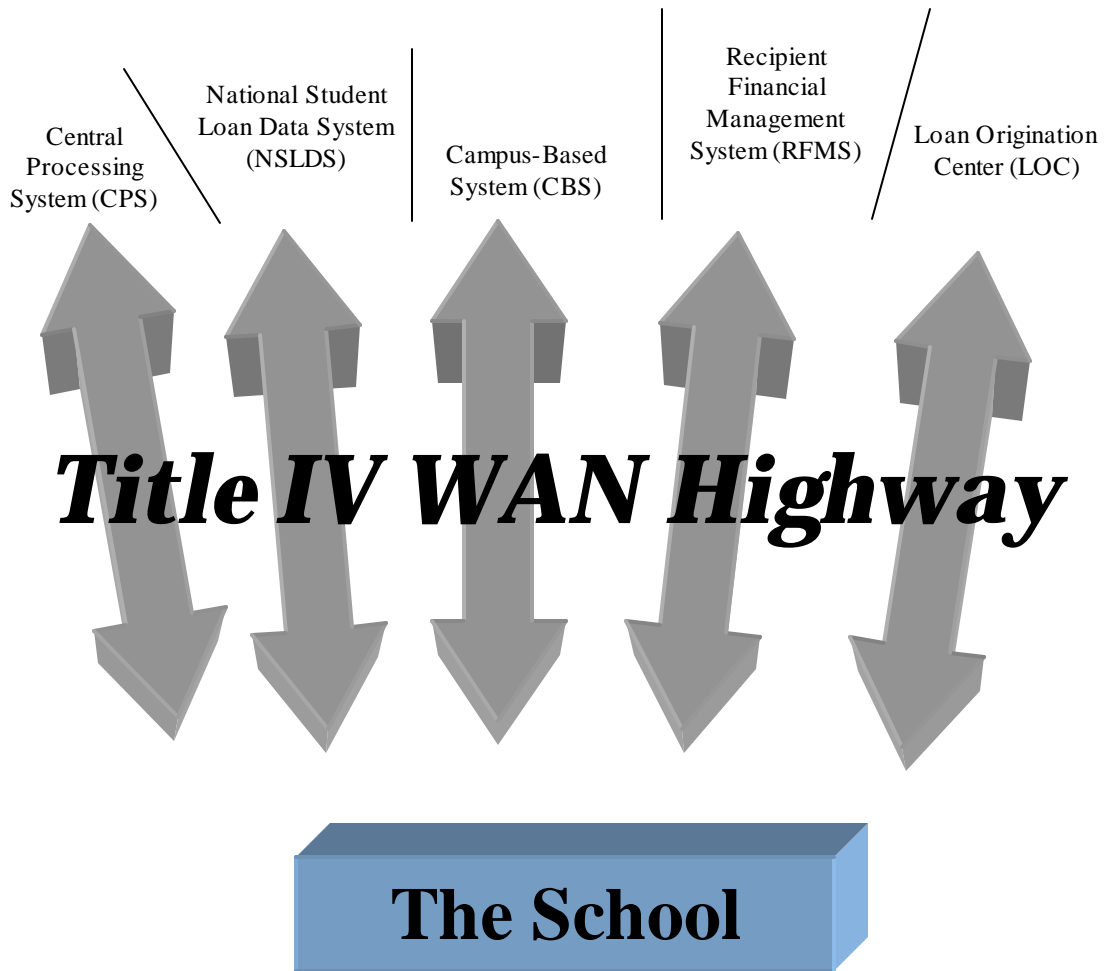
³ Currently must use Netscape Navigator 3.0 or 3.01 (domestic) or Microsoft Internet Explorer 4.0 in order to utilize FAFSA on the Web. The Department is currently testing other web browsers that will be made available to the public in the near future.

_____* - See Glossary



How do schools send and receive data electronically?

TIV WAN Destination Points

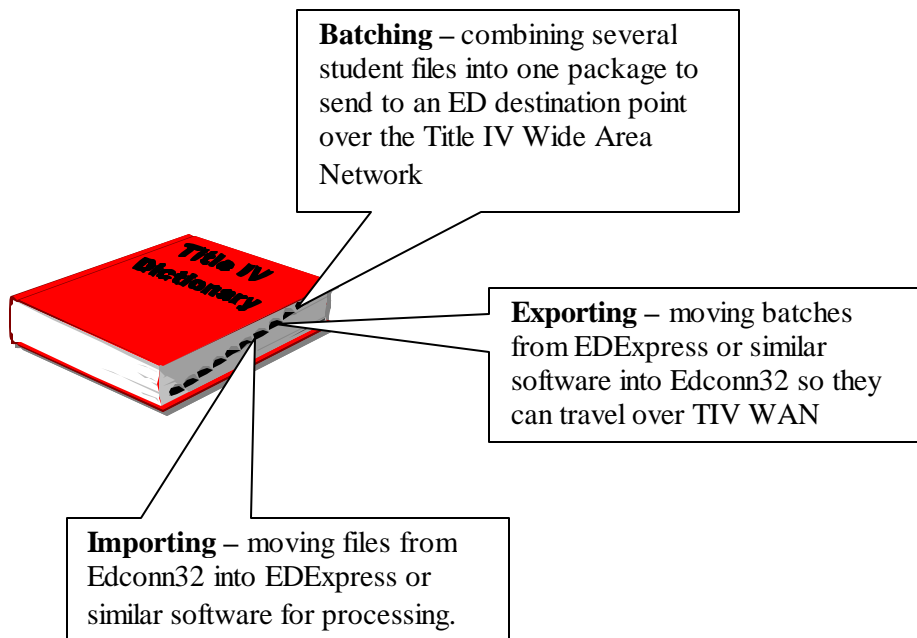




Checkpoint #1 – Destination Points

In the situation described below, fill in the appropriate destination points.

Santana College has just gotten connected to the Title IV Wide Area Network. They are anxious to get off the ground with several processes. First, financial aid employees take a pile of student FAFSAs so they can enter the data to send them to the _____ for processing. The school, a Perkins participant, will send campus-based data to the _____. Being a Direct Loan school, some members of the staff are busy preparing data to submit to the _____. Then they need to report overpayment information to the _____. Finally, they must report Pell disbursements to _____.



Filename

Message Class			Extension
Electronic Applications	1999-00	In to ED	First file of this type
E A P S	0 0	I N	. D A T
Content of File	Year	Which way the data is moving	The number of files of this type there have been
S A R A	0 0	O P	. 0 0 2
Processed applications (ISIRs)	1999-00	Out from ED	Third file of this type



Checkpoint #2 – Terminology

- 1) A package of data is called a _____.
- 2) In a process called _____, you can create a _____ using _____, and then move it into _____ so it can ride the TIV WAN highway.
- 3) The process of _____ involves moving data from Edconn32 into _____.
- 4) The filename is **EAPS99IN.04**. What is the year? _____
Is the data traveling to ED or to the school? _____
How many *previous* files of this name have been sent? _____

What role does the Internet play in Title IV?



Final Exam – Electronic Requirements

True or False

- 1) Even though ED requires schools to be able to access the IFAP page, ED will always send paper versions of Dear Colleague letters to schools.

- 2) The vehicle on which schools must place their data to be sent over the TIV WAN highway is called EDExpress. _____
- 3) The Central Processing System (CPS) and the school's financial aid office are both examples of destination points. _____
- 4) In the filename EAPS99IN.001, the IN describes data coming in to the school from ED. _____
- 5) Schools must register with ED to use any part of the IFAP web site.

- 6) Some features of EDExpress involve electronic applications.

- 7) Data your school receives over the TIV WAN must be imported from EDconnect into EDExpress (or other software) before you can read and use the data. _____
- 8) If your school undergoes a change of ownership, you must now report this change to ED electronically. _____
- 9) Your business office may either use GAPS or order funds using a paper "Title IV I-52 Request Form." _____
- 10) Electronic participation is strongly encouraged by ED, but is not currently required. _____

How do schools get answers to questions regarding the electronic requirements?

CUSTOMER SERVICES AND OTHER INFORMATION FOR ED SOFTWARE AND ELECTRONIC SERVICES		
Service Unit Phone Number and E-Mail Address	Service Area	
	Customer Service	ED Software and Technical Resources
CPS Customer Service and Direct Loan Technical Customer Service 1-(800) 330-5947 (7:00 A.M. - 7:00 P.M. CST) e-mail: CPS@NCS.COM fax: 1-(319) 358-4260	<ul style="list-style-type: none"> ♦ Technical support for EDExpress for Windows (Application Processing, Packaging, Direct Loans, SSCR), EDExpress for Windows Tutorial (CD-ROM and diskette versions), AWARE (Early Awareness Software), IQAP for Windows, FISAP software, and Pell Payment for Windows ♦ Questions on ISIRs (applications, corrections, and duplicates) ♦ PC and LAN configuration support to run EDExpress ♦ Phone walk-through of software to ensure user understanding ♦ State agency electronic data needs (EDE or tape) ♦ Questions regarding EDE Technical Reference for custom system developers ♦ SSCR record processing in EDExpress ♦ Data reconciliation issues between DL schools and DL Origination Center ♦ On-site support at DL schools to ensure continued processing ♦ Questions on FISAP software 	<p>Software</p> <ul style="list-style-type: none"> ♦ EDExpress (Application Processing, Packaging, Direct Loan, SSCR) software ♦ EDExpress for Windows Tutorial (CD-ROM or diskette) ♦ AWARE (Early Awareness Software) ♦ IQAP for Windows ♦ FISAP (to be released Summer 1998) ♦ PC hardware/software support for Pell Payment software for Windows <p>Technical Specifications</p> <ul style="list-style-type: none"> ♦ <i>Electronic Data Exchange (EDE) Technical Reference Guide</i> (process FAFSA application data with CPS, interface external systems with EDExpress, SSCR, and Packaging functions)

CUSTOMER SERVICES AND OTHER INFORMATION FOR ED SOFTWARE AND ELECTRONIC SERVICES (CONT'D)

Service Area		
Service Unit Phone Number and E-Mail Address	Customer Service	ED Software and Technical Resources
<p>FAFSA on the Web/FAFSA Express Customer Service</p> <p>1-(800) 801-0576 (7:00 A.M. - 4:30 P.M. CST)</p> <p>e-mail: CPS@NCS.COM</p>	<ul style="list-style-type: none"> Technical support for FAFSA on the Web and FAFSA Express Assist with FAFSA Express software on user's PC (from disk or downloaded from ED's Web page) Questions regarding applicant status and signature page hold Basic connectivity questions to transmit application Help accessing the Web page 	<p>Software</p> <ul style="list-style-type: none"> FAFSA on the Web FAFSA Express
<p>Title IV WAN Customer Service</p> <p>1-(800) 615-1189 (7:00 A.M. - 10:00 P.M. CST)</p> <p>e-mail: T4WAN@NCS.COM</p>	<ul style="list-style-type: none"> Technical support for EDconnect for Windows, Integrated Application Menu (IAM), and mainframe transmission software Transmission problems connecting to the network Transmission errors Network password changes and resets Status of mailbox Restoring data to mailbox Enrollment and participation Billings and invoices Distribution of software and user's manual Technical Support for NSLDS (enrollment, receiving/sending SSCR file, getting into NET*CONNECT for on-line query) 	<p>Software</p> <ul style="list-style-type: none"> EDconnect for Windows Integrated Application Menu (IAM) software <p>Technical Specifications</p> <ul style="list-style-type: none"> <i>Title IV WAN Mainframe Guide</i> Instructions for using the Title IV WAN in a mainframe environment <i>EDconnect for Windows User's Guide</i> Specific information about using Title IV WAN and EDconnect for Windows

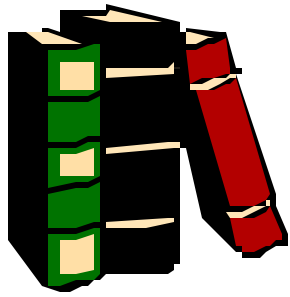
CUSTOMER SERVICES AND OTHER INFORMATION FOR ED SOFTWARE AND ELECTRONIC SERVICES (cont'd)

Service Area		
Service Unit Phone Number and E-Mail Address	Customer Service	ED Software and Technical Resources
<p>NSLDS Customer Service</p> <p>1-(800) 999-8219 (7:00 A.M. - 7:00 P.M. EST)</p>	<ul style="list-style-type: none"> Technical support for Small School Template and DataPrep Software (for Federal Perkins Loan Program reporting) Default rate calculations SSCR reporting Financial aid history (FAT) information (ISIR/prescreening) Data provider monthly submissions On-line functions User manuals 	<p>Software</p> <ul style="list-style-type: none"> Small School Template DataPrep Software NSLDS-The Paperless Link (NSLDS Computer Based Training Tutorial) <p>Technical Specifications</p> <ul style="list-style-type: none"> NSLDS Data Provider Instructions for Schools <p>Technical reference providing data to NSLDS</p>
<p>Direct Loan Technical Support for Custom/Combo Institutions</p> <p>1-(800) 756-4220 (8:30 A.M. - 5:00 P.M. EST)</p> <p>e-mail: DLTS@NCS.COM</p>	<ul style="list-style-type: none"> Technical assistance in interpreting Direct Loan Technical Reference Errors received while interfacing an external system with EDEexpress Questions on developing import from external add/change files Procedural walk-throughs of the Direct Loan Program for schools designing custom systems or planning to interface with EDEexpress On-site support to Direct Loan schools with custom/combo systems 	<p>Technical Specifications</p> <ul style="list-style-type: none"> Direct Loan Technical Reference (create custom system to support all DL Program essentials, or combine portion of EDEexpress functions with external systems)

CUSTOMER SERVICES AND OTHER INFORMATION FOR ED SOFTWARE AND ELECTRONIC SERVICES (CONT'D)		
Service Unit Phone Number and E-Mail Address	Service Area	
	Customer Service	ED Software and Technical Resources
Direct Loan Origination Center 1-(800) 848-0978 (7:00 A.M. - 7:00 P.M. EST)	<ul style="list-style-type: none"> ◆ Direct Loan Batch Status ◆ Batch Integrity Errors ◆ Acknowledgments ◆ Rejected Direct Loan Batches ◆ Promissory Notes ◆ Check Sum Errors 	
Federal Pell Grant Program Hotline 1-(800)-4PGRANT (8:30 A.M - 5:30 P.M. EST)	<ul style="list-style-type: none"> ◆ Individual Records Rejects ◆ Batch Status ◆ Pell DOS Software Support ◆ Year-to-Date Pell Payment Data Requests ◆ Floppy disk or recipient (tape) data exchange 	
Customer Support Branch 1-(800) 433-7327 (9:00 A.M. - 5:00 P.M. EST) e-mail: CSB@ED.GOV fax: 1-(202) 260-4199	<ul style="list-style-type: none"> ◆ Federal Student Financial Aid policy questions ◆ Questions on electronic SFA information for SFA professionals ◆ Liaison to other ED offices 	

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Resources

- ★ Dear Colleague Letter GEN-97-11 (Electronic Requirements)
- ★ Dear Colleague Letter GEN-96-20 (EDE participation)
- ★ Dear Colleague Letter GEN-97-6 (Electronic Filing of the Application to Participate)
- ★ 1999-00 EDE Technical Reference
- ★ *Payees Guide for the Grant Administration and Payment System* (now available at <http://gapsweb.ed.gov/training>)

Answer



Key

Checkpoint #1 – Destination Points

CPS; CBS; LOC; NSLDS; RFMS

Checkpoint #2 – Terminology

- 1) **batch**
- 2) **exporting; batch; EDExpress; EDconnect**
- 3) **importing; EDExpress**
- 4) **1998-99; to ED; 4**

Final Exam – Electronic Requirements

- 1) **False**
- 2) **False**
- 3) **True**
- 4) **False**
- 5) **False**
- 6) **True**
- 7) **True**
- 8) **True**
- 9) **False**
- 10) **False**